Session 3: Module 3 - Manage Alerts

FINAL

Description	Text
1. Introduction	Welcome to Session 3 Module 3 of the M-SPIRIT Required Online Training presented by the Montana Department of Public Health and Human Services WIC Program.
2. Start	Manage Alerts
3. ManageAlerts	You can create your own user-defined alerts that appear when you open a participant folder.
	Like notes, you can only create them via the Participant Activities menu in the participant folder.
4. <alerts_1>	To create a user-defined alert, click the Participant Activities menu.
5. <alerts_2>	Select Manage Alerts.
6. <alerts_4>	Alerts are managed for the entire household. No matter whose folder you open Alerts from, all of the household's alerts will be displayed.
	The Previously Defined Alerts grid displays all household alerts.
	The Household Member Name column indicates whose folder the alert was originally created in.
	The Date Alert Active column does not necessarily indicate when the alert was created. When you create or edit an alert, you can set the date to start appearing sometime in the future if you want. This is the date this column displays.
7. <alerts_4a>	The Alert Text column displays the first 35 characters of the alert.
	The only way to view the entire alert is to click the Edit button.
	We'll take a look at the Edit function in a couple of minutes.
8. <alerts_5>	Once an alert has been created, you can edit or delete it. We are going to delete the most recent alert.
	You can delete an alert at any time. Simply highlight the alert you want to delete in the Previously Defined Alerts grid and click the Delete button.
	Since the alert we are going to delete is already highlighted, just click the Delete button.
9. <alerts_6>	And click Yes on the "Are you sure...?" message.
10. <alerts_7>	You can also delete alerts when they display before the Participant Folder opens.
	Let's go do that. Click the Close button.
11. <alerts_8>	Click the Close Participant Folder icon.

Description	Text
12. <alerts_9>	We need to re-open Finnegan's Participant Folder so that the alerts display.
	Double-click on Finnegan.
13. <alerts_10>	If there are user-defined alerts, the Display Alerts window opens before the Participant Folder will open.
	It only shows alerts that have an Active Date (remember, that's the date the alert was set to appear) that is less than or equal to the current date.
	Notice that the Active Date does not display in this window. Makes it kind of tough to know when an alert is no longer applicable and should be deleted, doesn't it?
	We'll address that issue in a bit. For now, we'll focus on what you can do in this screen, which is review alerts and delete them when no longer applicable.
14. <alerts_11>	Again, the Abbreviated Text column displays the first 35 characters of the alert.
	The Text of Selected Alert displays the entire alert that is selected in the Alerts grid.
	Let's delete the second alert listed above. Click on that alert to highlight it in the Alerts grid.
15. <alerts_12>	Click the Delete Alert button.
16. <alerts_13>	Click Yes on the "Are you sure...?" message.
17. <alerts_14>	Since we still want to keep the remaining alert, simply click the Close button to continue opening the Participant Folder.
18. <alerts1>	We are going to work with the Rainbow household again to take a look at creating alerts.
	Click the Participant Activities menu.
19. <alerts2>	Select Manage Alerts.
20. <alerts3>	To create an alert, click the Add button.

21. <alerts4>	The Active Date defaults to the current date.
	It can be changed to a future date if you want the alert to start appearing on a specified date in the future instead of the current date.
	The Alert Type defaults to Household. This means that the alert will open regardless of which household member's Participant Folder is originally opened.
	If you select the Individual radio button, the alert will only appear when the participant's folder is opened in which the alert was first created.
	In general, there is no reason to set an alert to Individual.
	The Alert Security section defaults to Not Protected and should remain that way.
	The Protected radio button allows all users to view it but only those with "Protected Rights" to delete it. In Montana, none of our users have "Protected Rights".
	This means Protected alerts CAN'T be deleted!
	Do not use this functionality!
22. <alerts5>	We are going to type a quick alert into the Alert Text field.
23. <alerts6>	Did you notice that we typed the Active Date at the beginning of the alert text?
	This is a recommendation to help make your alerts more effective.
	Remember how alerts display when the Participant Folder is opened?
24. <alerts7>	There isn't any indication as to when the alert was first created because the Active Date does not display.
	This can make it kind of hard to determine whether the alert is still applicable and whether or not it should be deleted.
25. <alerts8>	Click the OK button to save the edited alert.
26. <alerts9>	Click the Close button.
27. Alerts5	Remember, alerts display when folders are opened but the active date does not display. A good practice is to always begin the alert text with the active date.
28. EditAlerts	You can edit alerts at any time once they have been created. However, the active date must be changed to the current date in order to save your edits.

29. \<alerts10\>	A couple more alerts have been created in the Rainbow folders. This time, we are going to edit an alert.
	The only way to edit an alert is once again via the Participant Activities menu. So, click to open the menu.
30. \<alerts11\>	Select Manage Alerts.
31. \<alerts12\>	If there is more than one alert listed, you will need to select the alert you want to edit.
	Remember, the only way to view the entire alert text while in this screen is to use the Edit button.
	However, we are going to actually edit the alert with the Active Date of 09/07/2010. For reference, today's date is 09/08/2010.
	Click on the alert we are going to edit.
32. \<alerts13\>	Once the alert is highlighted, we can click the Edit button. Go ahead and do that.
33. \<alerts14\>	We are going to edit the alert text by clicking and dragging our mouse over the text we want to edit so that it is highlighted.
34. \<alerts15\>	\<no script\>
35. \<alerts16\>	Now, we are going to type some new text.
	Go ahead and click the OK button.
36. \<alerts17\>	Did you remember that the Active Date has to be the current date or a date in the future?
	If not, M-SPIRIT will remind you.
	Read the system-generated reminder message and click the OK button.
37. \<alerts18\>	The orange highlight around the Active Date field ensures that we understand what needs to be changed to save our edited alert.
	Click on the date drop-down arrow to open the calendar.
38. \<alerts19\>	Remember, today's date is 09/08/2010. Click the Today button.
39. \<alerts20\>	Just a side note. We edited our alert the day after it was created so we didn't change the date at the beginning of our alert text.
	It is up to you whether or not you want to edit the date you recorded and whether it makes sense to do so…
	Click the OK button to save our edited alert.
40. \<alerts21\>	That's it for user-defined alerts.
	Click the Close button to exit the alerts window.
41. Questions	Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Frequently Asked Questions forum on the Montana WIC website.